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Netherlands

Fishery Products

Revised - Netherlands Fishery Products Report

2009

Approved by:
Steve Huete, FAS/The Hague
U.S. Embassy

Prepared by:
Marcel Pinckaers, FAS/The Hague

Report Highlights:
The Netherlands continues to offer opportunities for US seafood exporters, driven by an increase in seafood demand and a decrease in catch limits. In addition, the Netherlands provides an essential processing and logistics centre for seafood in Europe.

Includes PSD Changes: No
Includes Trade Matrix: No
Annual Report
The Hague [NL1]
[NL]

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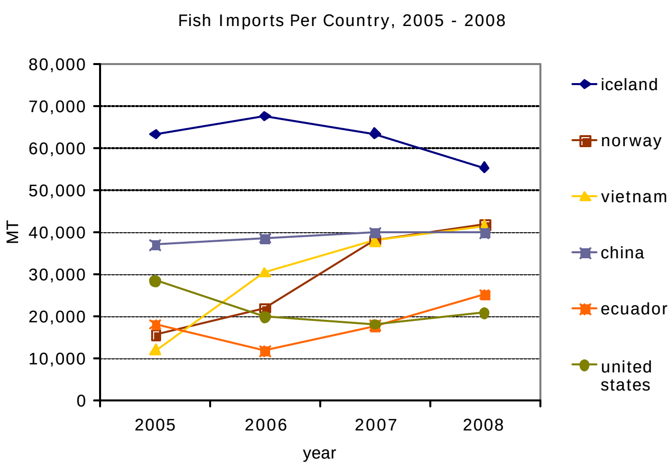
Trade

EU-27:
The EU is a net importer of fish products. Between 2002 and 2008, the EU's trade deficit grew by roughly a third in volume, from 2.5 million to 3.5 million MT. The EU depends more than ever on imports to meet its fish demand.

The 27 EU Member States imported last year an estimated 8.8 million MT of fish. Spain, France, Germany, Italy, the UK and the Netherlands were the largest importers. Similar to the previous year, 5.0 million MT were imports from third countries, the remaining being intra EU trade. Neighboring Norway remains the largest supplier of fish with a market share for 2008 of 10% (of total EU imports, including intra EU). China has become the second largest supplier with exports that more than doubled over the past 5 years. Individual import market shares of other main suppliers like the US, Iceland, Argentina and Thailand have been stable at around 3%. Imports from Vietnam grew enormously from 32,000 MT in 2002 to more than 320,000 MT in 2008, which makes Vietnam the third largest supplier of fish to the EU. The once leading suppliers Russia and the Faroe Islands were not able to benefit from the EU's growing deficit. In terms of value the increase of EU fish imports grew at a much faster pace, due to rising seafood prices. Average import prices grew by 40% over the past 3 years.

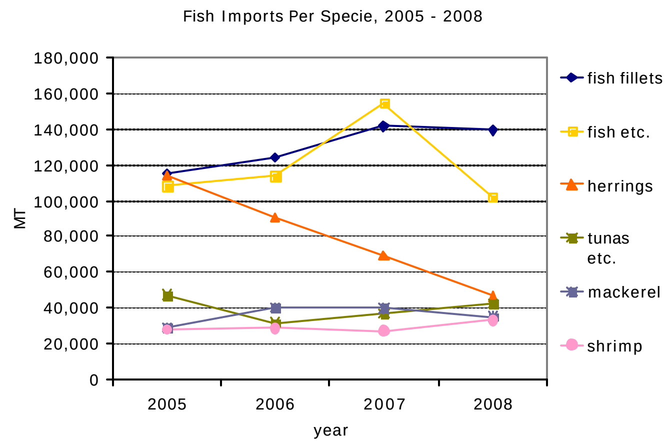
The Netherlands:
The Netherlands provides an essential processing and logistics centre for seafood in Europe. It is the EU's 6th largest importer of seafood, importing 0.7 million MT in 2008 of which roughly half originated from outside the EU. Its largest non-EU suppliers are Iceland, Norway, Vietnam and China. The US' exports to the Netherlands totaled almost 21 thousand MT, or 3% of 2008 imports. Exports were dominated by shipments of fish fillets, cod and salmon.

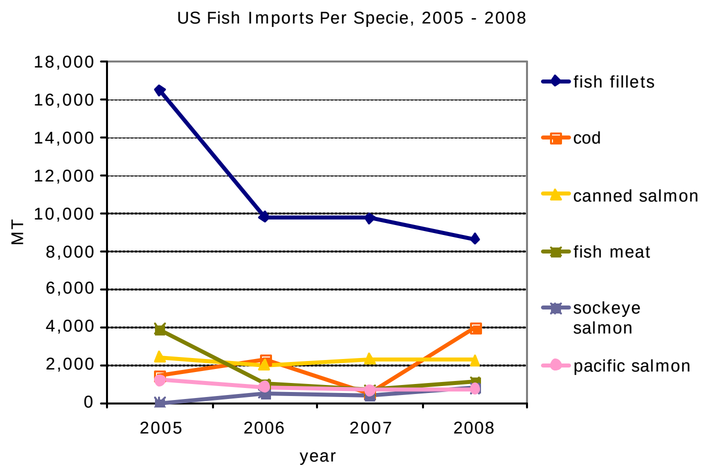


Still accounting for over 40% of total US seafood exports, shipments of frozen fillets (Alaska Pollock) dropped further to 8,656 MT in 2008, just over half of 2005 volumes. In the past 3 years, the decline of US exports of Alaska Pollock has been substituted by an increase of frozen Pangasius from Vietnam. Another reason for the lower volumes is the fact that some Alaska Pollock is coming into the EU through German and Belgian ports. In the Alaska Pollock segment, the US competes with China and Denmark.

Exports of US cod accounted for 4 thousand MT or almost 20% of total US seafood exports to the Netherlands. The US clearly benefitted from the boost in Dutch imports of frozen cod, just like Norway and Russia.

US salmon exports, the third largest product group, totaled 2,300 MT, similar to previous years. The US is the largest supplier of salmon (prepared or preserved) and accounts for roughly two thirds, followed by Canada.





Retail And Foodservice

Europe offers the most developed market for MSC-labeled seafood, characterized by consumers who are concerned about seafood sustainability and an active, engaged retail sector offering a wide choice of MSC products. The UK and Germany are the two countries where consumers can find the greatest choice of MSC-labeled products; but Dutch, Austrian, Swedish and Swiss shoppers are also discovering more sustainable seafood products. According to MSC, more than 30 European retailers already offer MSC-labeled seafood across a wide range of fresh, frozen, canned, smoked, chilled products, and ready-meals.

The Dutch retailers association (CBL) has announced the ambition that by 2011 all wild caught fish and seafood sold by its members would be MSC-certified. This is an unprecedented commitment for an organization that represents the vast majority of the Dutch food retail sector. Individual retail organizations like Albert Heijn, Schuitema and Superunie are actively seeking sustainable MSC certified products. Also HRI players are moving in this direction as Sodexo, Netherlands' leading caterer, is supporting the practice of sustainable fishing by offering fish products with the MSC label. Earlier this year, Sodexo became the first contract caterer in the Netherlands to be certified.

The distribution of seafood products increasingly continues to be dominated by food retailers. More detailed information on the Dutch HRI and food retail sector can be found in respectively GAIN Report NL9002 and GAIN Report NL7028.

Consumption

The combined population of all 27 member countries has been estimated at almost 500 million. According to FAO statistics, the average per capita consumption of fish in the EU is around 22 kg per year which results in a total consumption of almost 11 million MT.

There are huge differences between the various MS. The lowest per capita consumption of fish, up to 15 kg per year, can be found in the Central and Eastern European Member States. The North West European Member States (including the Netherlands) show average consumption figures between 15 and 30 kg of fish per year whereas people in Southern European countries eat more fish. In Portugal and Spain, the per capita consumption of fish is 60 and 40 kg per year, respectively.

Last year the market grew, in volume, by 2 percent as the Dutch continue to buy every year more seafood products. Research conducted by the Dutch Fish Marketing Board shows that it is not that more people are buying fish, but that the ones that already buy fish are buying more.

The most frequent buyers group is the 50+ yrs age group, which in addition has a higher than average disposable income and generally speaking pays more attention to eating healthy. This age group furthermore buys seafood products about once a week. Finally, the research showed that fresh and frozen products are gaining market share at the expense of canned seafood products.

To further increase the consumption of seafood in the Netherlands, the Dutch Fish Marketing Board launched a campaign that focuses on the healthy benefits (Omega-3 fatty acids) of eating fish but also on its taste and variety. Its goal is that in time the Dutch consume seafood products two times a week.

Opportunities

The Netherlands is a country that continues to be a market with lots of opportunities for seafood exports, mainly due to its decreasing catch limits and increasing demand for seafood.

The U.S. has lost one place and is now, after Norway, China and Vietnam, the EU's fourth largest supplier of fish. In terms of volume, exports have been stable over the past 5 years at around 260 thousand MT. Almost 40% of U.S. fish exports are Alaska Pollock. Cod and surimi together represent another 20% of U.S. exports to the EU. Other noteworthy products include salmon, lobster, hake, mackerel, cuttlefish, squid, and scallops.

The Dutch market continues to offer ample opportunities for frozen fish fillets. The US competes with other countries (China and Denmark) on the Alaska Pollock market. Within the fillets market Alaska Pollock is competing with other species like Pangasius from Vietnam.

Cod also increasingly provides opportunities for the US industry. In this market the US competes with Norway and Russia.

The Dutch market for canned salmon has been more or less stable over the past 5 years. The US continues to be the main supplier although in 2008 Canada saw its market share increase at the expense of the US. The market for frozen sockeye salmon almost doubled in 2008 and continues to be supplied solely by the US.

Another market where the US has been successful over the years is the scallops markets; total exports and its market share on the import market grew.

Marketing

Participating at seafood trade shows has demonstrated itself to be an effective tool in US companies' desire to expand their international business. The following trade shows are considered the most important international seafood trade shows attracting international buyers.

- The International Boston Seafood Show
Boston Convention and Exhibition Center,
Boston, Massachusetts, U.S.A.
www.bostonseafood.com

The International Boston Seafood Show attracts not only domestic buyers but also overseas buyers through, among other tools, the Buyers Mission, organized by the US seafood cooperators.

- European Seafood Exposition (ESE)
Parc Des Expositions,
Brussels, Belgium
www.euroseafood.com

The largest international seafood tradeshow is ESE, annually held in Belgium. This show is endorsed by the USDA's Foreign Agricultural Service, which means that FAS/Washington works with the show organizer to create a US pavilion. Please go the following website for a complete overview of all USDA endorsed tradeshows, http://www.fas.usda.gov/agx/trade_events/Tradeshowcalendar2008_2009.pdf.

The seafood cooperators listed below are represented at ESE.

Alaska Seafood Marketing Institute (ASMI)
311 N. Franklin Street
Suite 200
Juneau, Alaska 99801-1147, USA
Phone: (800) 478-2903
Phone: (907) 465-5560
Fax: (907) 465-5572
Info@AlaskaSeafood.org
www.alaskaseafood.org

Food Export USA - Seafood Program Office
Colleen Coyne
Seafood Program Coordinator
25 Fairway Circle
Hope Valley, Rhode Island 02832, USA
Phone: (401) 491-9017
Fax: (401) 491-4104
ccoyne@foodexportusa.org
www.foodexportusa.org

Southern U.S. Trade Association (SUSTA)
2 Canal Street Suite 2515
New Orleans, Louisiana 70130, USA
Phone: (504) 568-5986
Fax: (504) 568-6010
susta@susta.org
www.susta.org

Western U.S. Agricultural Trade Association (WUSATA)
4601 NE 77th Ave., Suite 120
Vancouver, Washington, USA 98662
Phone: (360) 693-3373
Fax: (360) 693-3464
www.wusata.org

More specific marketing information on Member State level can be obtained by contacting the individual FAS offices with the EU. They are also in a better position to provide you with listings of fishery products importers. Their contact details can be found at http://www.fas.usda.gov/scriptsw/fasfield/ovs_directory_search.asp.

The U.S. Department of Commerce at the U.S. Mission to the EU has written a report on how to export seafood to the EU. Given the complexity of the EU legislation, this report provides an overview of key EU legislation governing trade in fish products. For more information, contact Stephane Vrignaud at:
Tel: +322-508-2842
Fax: +322-513-1228
Stephane.vrignaud@mail.doc.gov

Please find below an overview of the Fishery Products reports from FAS posts within the EU as of January 2007. These and other reports, such as FAIRS, Exporter Guides, HRI and Food Retail reports, can be downloaded from the following FAS website:
http://www.fas.usda.gov/scriptsw/attacherep/default.asp

Country	Title	Date Report	Number
Norway	Annual	10/06/2008	NO8004
EU-27	EU Fishery Marketing Report	05/06/2008	NL8009
EU-27	EU Fisheries Policy Report	03/28/2008	E48029
Sweden	Sweden imposes new legislation to stop overfishing	02/15/2008	SW8001
Norway	Annual	10/16/2007	NO7006
Bulgaria	Bulgarian Fish Imports Update	08/20/2007	BU7008
Poland	Update	06/28/2007	PL7035
Czech Republic	Fish and Seafood Market Brief	04/26/2007	EZ7004
EU-27	Annual Report	01/30/2007	E47006
Spain	Report	01/11/2007	SP6037

Contacts

For more information on the Dutch seafood industry or listings of Dutch fishery products importers, please contact Marcel Pinckaers at marcel.pinckaers@fas.usda.gov or +31 (0)70-3102.305.

Product Board Fisheries
Treubstraat 17
PO Box 72
2280 AB Rijswijk, The Netherlands
Phone: +31 (0)70 3369623
Fax: +(0)70 399 9426
www.pvis.nl

Dutch Fish Marketing Board
Treubstraat 17
PO Box 72
2280 AB Rijswijk, The Netherlands
Phone: +31 (0)70 3369655
Fax: +(0)70 39 52 950
www.visbureau.nl